



Appendix C. Innovative Strategies and Best Practices

Introduction

The Elderly and Disabled Component of MTC's 2007 Coordinated Public Transit-Human Services Transportation Plan for the San Francisco Bay Area provided five goal statements by which to improve mobility options:

- Enhance land use and transportation coordination;
- Promote enhanced pedestrian access to public transit and other alternative modes of travel;
- Promote coordinated advocacy and improve efforts to coordinate funding with human services agencies;
- Improve inter-jurisdictional and intermodal travel;
- Develop and implement mobility management approaches.

Work towards each of these continues throughout the Bay area, in varying stages of implementation depending on planning, funding and other constraints. However, the final goal, **to develop and implement mobility management approaches**, is of increasing importance for MTC and its partner organizations, where mobility management becomes a mechanism for extending scarce resources and encouraging more target group individuals to use public transit. Such mechanisms are essential in this economic climate.

With this in mind, this section provides provide information relevant to understanding mobility management: **what it is, what it can do**, national **resources to learn more**, and **where and how it operates**. Three case-studies are provided to demonstrate not only the breadth of mobility management programs and activities, but also how to measure and report on these activities.

Additionally, this section further investigates mobility management by providing a look at CTSA's (Consolidated Transportation Services Agency), a long-standing organizational structure in California that increasingly functions as a mobility manager or promotes mobility management. By looking at CTSA's in three stages of their organizational life cycle, **mature programming, early programming, and start-up**, this review provides relevant information about the work of CTSA's in relation to mobility management.

Six case studies are presented, selected as examples of relevance or applicability to the Bay area's many environments. The programs highlighted are regional in focus and scope, promote inter-jurisdictional



trips, are creating resources that are web-based and readily accessible, and oriented towards performance reporting. They feature just some of the many facets involved in mobility management or in developing a CTSA. These six examples represent only a snapshot view of the many of successful programs providing services regionally, in California, and throughout the Nation.

Specifically, this Appendix provides for:

- Defining Mobility Management
- National Resources for Mobility Management
- Mobility Management in Practice: Three Examples
- Defining CTSA-Consolidated Transportation Service Agencies
- CTSA Organizational Stages: Three Examples

Defining Mobility Management

Mobility management is a strategic approach to connecting people needing transportation to available transportation resources within a community. Its focus is the person, the individual with specific needs, rather than a particular transportation mode. The National Resource Center for Human Service Transportation Coordination (NRC) defines mobility management as **“a process of managing a coordinated community-wide transportation service network comprised of the operations and infrastructures of multiple trip providers in partnership with each other.”**

Mobility management was a new approach referenced in 2005 SAFETEA-LU statute as an eligible expense for the Section 5310 Elderly and Disabled Transportation, Section 5317 New Freedom, and Section 5316 JARC programs. SAFETEA-LU defines mobility management as “short-range planning and management activities and projects for improving coordination among public transportation and other transportation-service providers carried out by a recipient or subrecipient through an agreement entered into with a person, including a government entity.” The NRC, building upon the statutory description of mobility management activities “emphasizes:

- moving people instead of moving vehicles,
- the discrete travel needs of individual consumers,
- customer needs,
- the entire trip, not just that portion of the trip on one mode or another,
- making visible improvements to the effectiveness, efficiency, and quality of the travel services being delivered,
- designing and promoting transit oriented developments, livable cities, and energy efficient sustainable communities, and
- improving the information available about those services.”¹

¹ National Resource Center for Human Service Transportation Coordination (NRC) website is available at: <http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=372&z=78>



Importantly, mobility management focuses on identifying diverse travel choices, services and modes, particularly those services that will help to meet individualized transportation needs. Through partnerships with many transportation service providers, mobility management enables individuals to find a travel method that meets their specific needs, is appropriate for their situation and trip, and is cost effective. In other words, a mobility management center can be a one-stop shop for transportation, promoting a range of mobility services.

Functions and Activities

Mobility management activities can range from simple to complex, and mobility management centers can choose to focus on a small number of services and coordination efforts, or to offer a broad range of services. For example, at the most basic level, mobility management can provide information, referrals, and assistance in accessing local and regional transportation services. At a higher level, mobility management often works to broker trips for individuals needing transportation from the most appropriate and cost-effective provider.

Key functions may include:

- Developing outreach and marketing materials;
- Developing partnerships within local community and with agencies in multiple sectors;
- Identifying opportunities to expand transportation coordination with partners and community network;
- Selling bus passes and/or distributing free passes
- Designing and implementing mobility management and coordination initiatives;
- Providing travel training and trip planning assistance to the community;
- Developing one-stop information and referral centers;
- Developing transportation brokerages to refer individual trip requests to providers;
- Continuing research about technological innovations and strategies to improve transit ridership;
- Making public presentations about the benefits of mobility management for the community;
- Participating in relevant public transit and human services trainings and conferences;
- Grant writing to secure future funding sources;
- Providing travel training and trip planning assistance to the community

Housing Mobility Management

Mobility management can find many types of operational homes. Communities may establish a mobility manager function either through an individual or at a local agency, non-profit organization, or transit operator. As mobility management starts with partnerships, it can begin at the local level with a position at a senior center, a mental health clinic or a veterans' service organization to support some of the functions detailed above. At a larger geographic level, mobility management can function through a regionally-focused agency, which could be a transit agency, a CTSA, a 2-1-1 organization or a county department.



The orientation of mobility management at the local or community level or at an agency and regional level may dictate the scope and nature of the mobility management services undertaken. Direct customer-focused services are more likely to be provided at a local level. Regional mobility management sometimes focuses more on systems-level planning, partnership building and on training. Increasingly, transit agencies are realizing the benefits offered by mobility management and are implementing mobility management programs. Conversely, in various areas of the country, mobility management centers are developing, often run by non-profit agencies that developed these in response to their specific communities' needs.

National Resources for Mobility Management

For further information and technical assistance related to mobility management, the following organizations offer valuable resources:

United We Ride

www.unitedweride.gov

United We Ride aims to improve the availability, quality, and efficient delivery of transportation services for transportation disadvantaged population. It provides numerous resources including toolkits, trainings and technical assistance related to mobility management, planning, and the creative services common to rural settings. United We Ride is a Federal interagency initiative of the **Coordinating Council on Access and Mobility (CCAM)**.

Community Transportation Association of America [CTAA]

<http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=23&z=2>

Through its many programs, resources, publications and trainings, CTAA seeks effective public and community transportation. On CTAA's website and at its expos, resources about employment, medical, rural, and urban transportation; senior mobility; and transportation funding are provided. CTAA also publishes numerous magazines and newsletters. Two of CTAA's programs are detailed below.

- National Resources Center for Human Service Transportation Coordination [NRC]

<http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=8&z=62>

A program of CTAA, the NRC supports coordination between transit providers, human service agencies, private institutions, businesses, volunteers and political leaders to broaden transportation options. The NRC offers numerous tools and resources for coordination and mobility management.



➤ Partnership for Mobility Management

<http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=1790&z=95>

The Partnership for Mobility Management is a collaborative partnership of national organizations. Dedicated to connecting and supporting mobility management professionals. The Partnership for Mobility Management offers detailed information on beginning a mobility management program, measuring program activities, and every element in between.

American Public Transportation Association [APTA]

<http://www.apta.com>

APTA provides a Mobility Management Technical Assistance Center that offers a resource library, links to additional information and, importantly, studies about the economic benefits of mobility management.

Transportation Cooperative Research Program [TCRP]

<http://www.tcrponline.org/>

TCRP publications address all facets of the transportation industry and well researched information offers problem solving approaches and innovative strategies for managers, administrators and policy makers.

Easter Seals Project ACTION [Accessible Community Transportation in our Nation]

www.projectaction.org

Project Action provides training and technical assistance in relation to accessible transportation and implementation of the ADA (Americans with Disabilities Act). Project ACTION maintains an extensive resource library that includes such topics as travel training, human service transportation coordination, youth and disabilities, and rail services. These resources, training and outreach opportunities are available on Project ACTION's website. Project ACTION is made possible through a cooperative agreement between Easter Seals and the FTA.

National Center on Senior Transportation [NCST]

www.seniortransportation.easterseals.com

Another project of Easter Seals, the NCST works to increase transportation options that will help older adults live independently in their communities. The NCST offers a resource library that speaks to aging / human service providers, transportation providers, as well as older adults and caregivers.



Mobility Management in Practice: Three Examples

The examples in this section include one regional program providing a comprehensive array of mobility management activities, travel training models which are important to the mobility management toolkit, and a performance monitoring program oriented to specialized transportation.

1. Multi-Faceted Regional Program:

Outreach, Santa Clara County, CA

Outreach Inc. is a non-profit Mobility Management center serving Santa Clara County, the most populous region in the Bay Area. A community transportation and social service provider, Outreach's programs include:

- ADA paratransit services for the Santa Clara Valley Transportation Authority: Outreach operates a paratransit brokerage that facilitates more than a million trips annually;
- Senior transportation, including paratransit and taxi subsidies and public transit passes; counseling; and advocacy services;
- Guaranteed ride program for eligible CalWORKS recipients;
- Jump Start vehicle repair program for CalWORKS recipients;
- Give Kids a Lift! program for dependents of CalWORKS recipients;
- Vehicle donation program;
- An enhanced call center that operates 365 days a year.

Outreach's services are available for numerous populations, particularly transit-disadvantaged populations, in the both urban and rural regions of Santa Clara County. These groups often include:

- | | |
|--|--|
| ➤ Older adults | ➤ Persons with disabilities and/or persons with varying functional abilities |
| ➤ Low-income persons, families and youth | ➤ Seniors |
| ➤ Homeless individuals | ➤ Welfare-to-work clients |
| ➤ Persons ADA-certified with functional disabilities | ➤ Unemployed and underemployed |
| ➤ CalWORKS recipients | ➤ Refugees/Immigrants |
| ➤ Veterans | ➤ Carless individuals and families |
| ➤ Limited-English speakers | ➤ Children & Youth |
| ➤ Persons without cars and/or transit-dependent | ➤ Residents of institutionalized settings |
| ➤ MediCal recipients | ➤ Farm workers and migrant workers in the rural parts of the County |
| | ➤ General Public (including tourists and visitors) |

Currently, Outreach provides over 1 million trips per year. On an average day there are over 250 Outreach vehicles on the road providing between 2,500 to 3,000 trips throughout the County.



Model for Coordination

Outreach affirms that its “service model is unique because it combines human service values with a transportation system that incorporates cutting-edge technologies and custom software solutions to increase program efficiency and cost effectiveness.”² This model provides a holistic approach—coordinated transportation services and social services—to every customer or caller.

In 2009 Outreach undertook a planning study, sponsored by Caltrans’ Department of Mass Transportation (DMT), to guide its effort of transitioning from an Intelligent Transportation Systems (ITS) brokerage coordination model into a Mobility Management Center. The resultant report, *Mobility Management Planning Study*³, details the elements involved in developing and funding a mobility management center, particularly one responsive to rural communities.

Outreach demonstrates that an initial step in becoming a coordinated community transportation provider lies in fostering partnerships with “public and private transportation providers, dozens of health and human service agencies, educational providers, aging entities, and employment programs, incorporating the advice and guidance of the customers themselves into each aspect of service.”⁴ The Outreach *Mobility Management Planning Study* provides a detailed look at how this non-profit planned for an enhanced response to providing coordinated transportation services that are specific to its region and partners. Available on Outreach’s website, this *Mobility Management Planning Study* is a worthwhile guide for any agency interested in mobility management:

<http://www.outreach1.org/public/OutreachMobilityManagementPlanningStudy.pdf>

In January 2011, Outreach was designated as a CTSA (Consolidated Transportation Service Agency) for Santa Clara County by MTC. The primary reason for this designation was to help Outreach overcome an administrative hurdle associated with receiving State Transit Assistance (STA) funds programmed as part of MTC’s Lifeline Transportation Program. Access to Transportation Development Act (TDA) funds and other STA funds is not permitted under Outreach’s designation, which is effective through June 2013; however, other benefits available to CTSAs are granted through the designation. Outreach had previously been designated a CTSA in Santa Clara County from 1982 through 1995, under MTC’s 1981 Action Plan for the coordination and consolidation of social service transportation services as required by the California Social Service Transportation Improvement Act (AB 120, 1979).

Leveraging Funding

Outreach utilizes 34 different funding sources, demonstrating how funds can be leveraged and the multiplicity of funding that is potentially accessible to non-profit entities. These sources include Federal

² <http://www.outreach1.org/index.htm>

³ Outreach, “Mobility Management Planning Study: Improving Rural Human Services Transportation Coordination through Partnership with “211/511, Office of Emergency Services; <http://www.outreach1.org/public/OutreachMobilityManagementPlanningStudy.pdf>

⁴ Ibid.



large and small urban Job Access & Reverse Commute (Section 5316-JARC) and New Freedom (Section 5317) funds as well as vehicle capital grants from Section 5310. Other Federal grant sources such as Housing and Urban Development (HUD) and Health and Human Services (HHS) are also utilized. State funding is received from State Transit Assistance (STA) and the Transportation Development Act (TDA). The program receives Tobacco Revenue Settlement funding as well. Regional and local funding is obtained from Santa Clara County general funds, County Measure A funds, and general funds from the cities of Campbell, Cupertino, and Santa Clara. Additional private funding is received from the car donation program revenue, and local foundations and corporations.

2. Mobility and Travel Training – Two Models:

Travel or mobility training is a continuing task of many mobility managers. Travel training involves teaching individuals how to use fixed-route transit independently and safely. Individuals receiving training can be older adults, people with disabilities, students, or anyone from the general public who wishes to increase their familiarity and comfort with public transit. Travel Training generally includes familiarization with the transit system and other community transit options, as well as the use of maps and schedules, transfers, fare systems, and mobility devices including wheelchairs on public transit. Travel Training encompasses many strategies, depending on the needs of the provider and those who want the training.

Travel training can be provided in various ways, depending upon the interests and abilities of the sponsoring agency:

- **One-on-One Training:** Specially designed instruction sessions are personalized to the individual transit rider to meet the needs and pace of the trainee.
- **Group Training:** Familiarizing larger numbers of persons to aide current riders or new users.
- **Peer-to-Peer Training:** Sometimes called an "Ambassador" or "Travel Buddy," this is often an older person volunteering to aid others.
- **Self-Directed Tools:** These can include Internet-based destination trip planners, videos and others.

Mobility training can enable greater independence for riders, as fixed-route offers more flexibility than ADA paratransit and transit familiarization may encourage riders to take trips they currently aren't making. The Draft Final Paratransit Report of MTC's Transit Sustainability Project (TSP)⁵ recommends travel training as a strategy for sustainable ADA paratransit that offers mutual benefits to riders and transit agencies: "An individual who has successfully completed travel training and uses fixed-route transit can travel more spontaneously and at less cost than on ADA paratransit (since fixed-route fares are typically less than ADA paratransit fares). The transit agency realizes cost savings for the paratransit trips that are not taken due to travel training. In addition the individuals gain greater mobility by

⁵ "Transit Sustainability Project: Draft Final Paratransit Report," Nelson\Nygaard Consulting Associates, etc. al., Metropolitan Transportation Commission, August 2011, http://www.mtc.ca.gov/planning/tsp/TSP_Draft_Apr2012.pdf



learning to use transit, which does not require advance reservations and has a much lower fare than ADA paratransit.”

Two travel training approaches are detailed below: first, a group senior transit familiarization program in urban Los Angeles County and secondly, self-directed web-based tools from Rural Trinity County’s travel training program.

An Urban Group Training Model:

Seniors on the Move, Los Angeles County, California

Los Angeles County Metro has supported a travel training program for Los Angeles County’s older adults since 2003. The program was initially driven by a concern that older adults need to know that they have alternatives to driving in order to avoid isolation and remain active in their communities after they reduce or stop driving. The program also recognized that navigating the public transportation system of Los Angeles County and its 88 cities can be daunting to some older persons, many of whom had not ridden public transit in decades, if at all. The program served an additional important role introducing older adults to alternatives to paratransit services.



These group transit familiarization sessions were held in senior centers across Los Angeles County. Each session was almost three hours in length and included 30-100 older adults. Trainings involved a bus trip to a local rail station or a public transit center and provided input on a range of topics that included hearing from a DMV Ombudsman on how to continue driving safely and when to reduce driving, and Metro staff on the new TAP (Transit Access Pass) program for seniors. Discussion and teaching detailed the steps involved in planning and taking a trip to demonstrate that public transit is a viable alternative and to lessen any apprehension involved with relinquishing one's ability to drive. The curriculum was tailored to each local community, to incorporate information about the area's community public transit programs as well as Metro services.

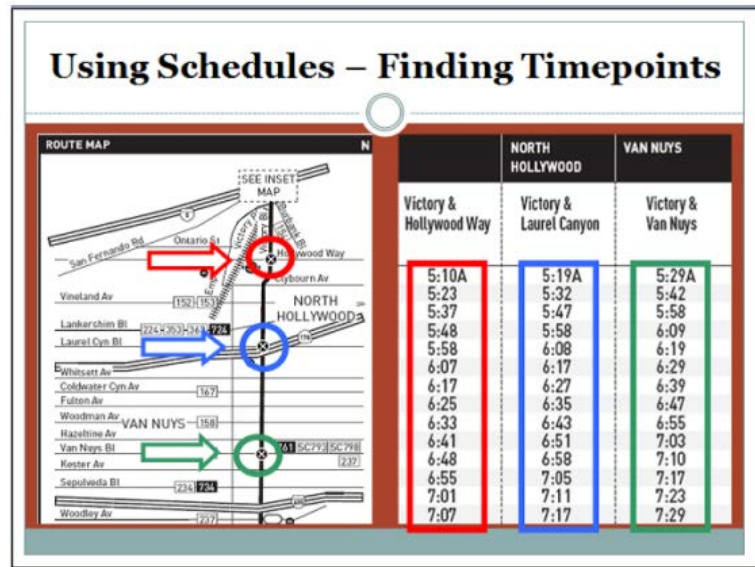
Six key areas comprised the basic elements of each session:

1. Safe driving for seniors
2. Fixed-route and paratransit systems
3. Destinations accessible using public transit
4. Using public transit



5. Field trip
 6. Final comments and evaluations
- Programs were offered with translation into the languages of local seniors when needed. Training materials were designed with a lively, upbeat orientation toward encouraging use of public transit. Additionally, participants ages 62 years and above received a free monthly pass for Metro services on a reloadable TAP card.

LA Metro's *Seniors on the Move* program continues, but is being redesigned to incorporate a new element: at each group presentation "Travel Buddies" will be recruited and trained to train their peers in individual or small group settings.



Self-Directed Web-Based Travel Training Tools: Rural Trinity County, California

Trinity Transit in northern California offers an example of web-based travel training, a readily transferable approach to travel training. Trinity Transit is implementing its recently completed *Transit Mobility and Awareness Plan*, which includes marketing and transit awareness components and a travel training program of web-based resources. Administered by County government, Trinity Transit faces the difficulties of rural environments as well as issues faced by all transit agencies, particularly the perception of transit as a viable option.

**Planning the Trip:
Trinity Transit Guide**

- Lewiston to Weaverville

- 1) Locate route on schedule
- 2) Check days of service

The screenshot shows a route map of Trinity County with a red circle around the Lewiston to Weaverville route. Below the map is a schedule table for the route.

Lewiston to Weaverville (M, R, F)		Weaverville to Lewiston (M, R, F)	
LEWISTON	AM	WEAVERVILLE	PM
River Rock	6:40	Weaverville Library	5:54
Garnettville Hill	6:43	Center & Hwy 3	5:56
Vista/Grove Ranch	6:43	Top's Mini Mart	5:57
Maxwell's Homeown Market	6:44	Airport Rd. & Hwy 3	6:00

Often lack of transportation is the result of a lack of knowledge, misperception or fear. Travel training can address such concerns of potential riders and can increase a transit system's visibility. Many of the travel training tools developed through the *Transit Mobility and Awareness Plan*, were created to be web-based and apply to multiple audiences to make transit information as accessible as possible. The web-based travel tools may also enable agency personnel to "train" their colleagues or



staff about using the local transit system.

Web-based travel training tools include:

- **For Individual Riders:** a web-presentation to guide new riders through key steps.
- **For Agency Personnel:** a downloadable “train-the-trainer” presentation for teaching consumers or colleagues about local public transportation and regional connections.
- **To Key Destinations:** a printable .PDF document to guide riders and agency personnel alike with step-by-step ride guides to known, popular destinations.

Each of these tools was designed to be stand-alone and easily downloadable from Trinity Transit’s website. As anyone can access these tools, the Trinity Transit travel training program is an ongoing effort that involves the community. These can be viewed at www.trinitytransit.org/.



3. Performance Measurement:

Riverside County's Specialized Transportation Program

Increasingly, mobility managers are considering ways to measure the value of their programs. Metrics often include both quantitative measures and qualitative indicators, such as customer comments, surveys, or anecdotes of a rider or a partner organization.

Riverside County Transportation Commission (RCTC) functions as a regional mobility manager through its Specialized Transportation Program. RCTC prepared a “lessons learned” report at the end of its first complete year of implementation of its Specialized Transportation Program. RCTC is the County Transportation Commission for a vast Southern California county that includes 7 public and local



transportation providers and a breadth of non-profit and human service specialized transportation provides across its 7,000 square miles that stretch from the Colorado River to the Los Angeles County line.

In the spring of 2008, RCTC conducted its first Universal Call for Projects, inviting agencies to apply for two-year project funding with three funding sources: Measure A, the local half-cent sales tax for transportation; JARC and/ or New Freedom funding. Projects oriented to any one or all of these funding sources could apply. Of the 27 applicants, 22 projects were awarded, including 4 public transit and 18 human service agencies. Funded-projects supported the goals of the 2007 *Public Transit—Human Services Coordinated Plan*, including: 1) to increase the numbers of trips available to target population groups; 2) to provide for capacity-building through transit information and transit-related training opportunities; and/or 3) to support mobility management. This first round of projects commenced operation on July 1, 2009.

Measuring Impact

In conducting the “Lessons Learned” report, officially titled the *Measure A/ JARC/ New Freedom Funded Services Year End Report, FY 2010*, various metrics were used to measure outcomes of the overall Specialized Transit Program and of each individual project. These included:

- **Provision of new or additional one-way passenger trips:** These included total trip counts by project type: 1) fixed-route services; 2) bus passes/ taxi/ rideshare programs; 3) mileage reimbursement programs, and 4) paratransit / community shuttle programs. Projects were also measured against their individual agency-generated goals developed during the grant application process and which became part of their signed two-year agreements.
- **Matching funds generated from various resources:** This measure became particularly important as it demonstrated collaboration and leveraging of funds. Agency match included cash match from city general funds, community development block grant funding, The California Foundation, Riverside County Dept. of Mental Health funding, Older Americans Act Funds, United Way, California Family Life Center, State Adult Education Funds and Federal Housing and Urban Development (HUD) funds and California Local Transportation Funds (LTF); volunteer labor and agency volunteer time, in-kind match, for selective projects; and local sales tax Measure A funds for certain projects.
- **Subsidy per trip:** This measure looked at the subsidized cost per trip for each project then grouped projects by four types to determine year-end average trip costs by similar project type.
- **Cost per trip in terms of RCTC subsidy and Agency Match:** Again grouping projects by trip type, this measure considers a trip’s total cost: RCTC’s subsidy or share versus agency match.



The qualitative review of the Specialized Transit Program's first Universal Call included a review of administrative challenges. This discussion looked at RCTC's and agencies requirements included in administering and operating these projects. Issues discussed included:

- Critical importance of moving to a reimbursement-based program, while addressing the cash flow implications to small agencies;
- Continuing monthly invoicing and reporting concurrence processes as an accountability tool;
- Field Audits by RTA (Riverside Transit Agency) regarding federal contracting requirements
- Budget alignment and line item changes as part of an agency-level cost control mechanism
- Agencies' Year End Qualitative Reports

The year-end "lessons learned" report provided for a tangible way to present successes and demonstrate effectiveness to the multiple funding and community partners and the RCTC's Commissioners. It also provided a rationale to recommend changes in administration, funding priorities, and program goals for the next funding cycles.

Documenting Success

RCTC has undertaken two Specialized Transportation Program Calls for Projects and anticipates its third cycle in the fall of 2012. In its 2012 Public Transit-Human Services Transportation Coordination Plan Update, as a result of both this program and its emphasis on performance measurement, it was possible to document the program's overall impact – at least in terms of trips provided. Specialized transit trips increased by 316% in the four year period between the two Coordinated Plans.

Perhaps more importantly, these specialized transportation trips were included in the total of the overall provision of public transportation trips across the County, reflecting all modes. The combined total reflected an increase in trips per capita from 6.9 trips per capita in FY 2005-06 to 7.2 in FY 2010-11. While this is a modest increase, what is notable is that Riverside County continues to see record level population growth. Its 40% increase between 2000 and 2010 made it the fastest growing County in the state. To sustain this population growth and still realize some increase in the transit trips per capita is exciting to report to policy makers and transit providers alike.

Defining Consolidated Transportation Service Agencies (CTSAs)

This section presents the authorization and basic characteristics of CTSAs, recognizing that they come in various forms. Three examples of CTSAs at different stages of development are presented.



What Is a CTSA?

A Consolidated Transportation Service Agency (CTSA) is an organization or agency that provides coordination transportation services, information resources to the public, and technical assistance to community and specialized transportation providers. CTSAs do not duplicate existing services; by coordinating providers and human and social service agencies they present riders with a wider range of mobility options. The coordination with multiple providers also enables CTSAs to increase the availability and cost-effectiveness of specialized transportation services and improve the quality and utilization of these services. CTSAs work to increase the public awareness of specialized transportation options. A CTSA is one method of mobility management as it, too, is locating multiple, coordinated services and meaningful alternatives under one roof.

Authorizing Legislation

CTSAs were made possible by California Legislation, the 1979 *Social Service Transportation Improvement Act*, also called AB 120. Seeking to facilitate the coordination of social service transportation services that were often times inefficient and duplicative, the Social Service Transportation Improvement Act allowed for the designation of CTSAs in each of California's counties⁶. Agencies authorized to make such designations include:

- county transportation commissions (CTCs),
- local transportation commissions (LTCs),
- regional transportation planning agencies (RTPAs),
- or metropolitan planning organizations (MPOs).

Specific functions were identified to allow for consolidation of transportation services and cost savings:

1. Combined purchasing of necessary equipment
 2. Adequate training of vehicle drivers to ensure the safe operation of vehicles, promote lower insurance costs and encourage use of the service.
 3. Centralized dispatching of vehicles to realize efficient use of vehicles.
 4. Centralized maintenance of vehicles so that adequate and routine vehicle maintenance scheduling is possible.
 5. Centralized administration of various social service transportation programs to eliminate numerous duplicative and costly administrative organizations, allowing agencies to respond effectively to specific needs.
 6. Identification and consolidation of all existing sources of funding for social service transportation services to provide more effective and cost efficient use of scarce resource dollars.
- Consolidation of categorical program funds can foster eventual elimination of unnecessary and unwarranted program constraints.

⁶ CalACT (California Association for Coordinated Transportation) developed an "e-book" that looks in detail at the Social Services Improvement Act provisions relating to CTSAs and provides relevant information about developing a CTSA. The CTSA e-Book is available on CalACT's website: <http://www.calact.org/doc.aspx?17>



To fund these activities, AB 120 authorizes CTSA to directly claim up to 5% of the local jurisdiction's Transportation Development Act (TDA) sales tax funds.

Following, three CTSA are reviewed, each in a different stage of their organization's development, to demonstrate the various purposes and diversity of programs and activities that CTSA can undertake.

CTSA Organizational Stages: Three Examples

1. *Mature CTSA Programming:*

Ride-On Transportation, San Luis Obispo

Ride-On Transportation is the CTSA serving San Luis Obispo County through innovative and unique transportation services. This non-profit operates under a complex financial and organizational structure and has a rich history of human service transportation.

Agency Profile and Organization

Mission: Ride-On is dedicated to improving transportation options in San Luis Obispo County through developing and implementing creative solutions to transportation and mobility issues that concern employers, businesses, medical providers, visitors services providers, special events coordinators, government agencies and individuals.

Organization and History: Ride-On is a non-profit cooperative organization comprised of the Consolidated Transportation Service Agency (CTSA) and the Transportation Management Association (TMA) of San Luis Obispo. United Cerebral Policy (UCP) was originally designated a CTSA in 1987 and provided evening and weekend service to persons with developmental disabilities. In 1993, it expanded its services, partnering with more social service agencies and adopting the name Ride-On. In 1995 Ride-On began providing additional services as a Transportation Management Association. Currently, Ride-On operates a multitude of services under three spheres: CTSA activities, TMA activities, and contracts to provide public transit services.

Activities and Programs

Ride-On CTSA services include:

- Senior Shuttle, door-to-door service for adults 65 years and older;
- Veterans Express Shuttle for disabled veterans or veterans with no means of transportation;
- Mobility Coordinator who works with the County's transportation providers to find transportation options for individuals who can't access or are unable to use public transportation;
- Tri-Counties Regional Center: transportation for riders with developmental disabilities to work and day programs;



- Medi-Cal Transportation with reimbursement from the State of California;
- Hospital and Medical Transportation.
- Community Interaction Program (CIP): evening and weekend transportation for individuals with developmental disabilities;
- Private rides for individuals;
- Social Service Agency Support: Vehicle procurement, driver training, preventative maintenance program, communications, drug testing programs and CHP inspections.

Ride-On TMA provides vanpools, airport/Amtrak shuttles, Guaranteed Ride Home, Lunchtime Express, Visitor and Medical Shuttles, Kid Shuttles, Special Events, RideShare Incentive Programs, and the Transportation Choice Program that reaches out to businesses to increase the alternative transportation knowledge of their employees.

Ride-On's Public Transit Contract Services include:

- Nipomo Dial-A-Ride
- Shandon Shuttle
- South Bay Dial-A-Ride
- Joint venture and regional systems

The populations served by Ride-On services include:

- | | |
|----------------------------------|---------------------|
| • Veterans and disabled veterans | • Older adults |
| • Agricultural workers | • Children |
| • MediCal recipients | • Commuters |
| • Low-income individuals | • Dialysis patients |
| • Individuals with disabilities | • General community |

Budget

The entire Ride-On Transportation Agency operates at a budget of \$4 million. CTSA services are funded by multiple sources, including:

- Federal – 5317 New Freedom,
- State – MediCal, and TDA Article 4.5,
- Local – Fundraisers and donations.

For More Information

- Ride-On Transportation: www.ride-on.org



2. *Early CTSA Program Activity.*

Western Placer County CTSA, Placer County, CA

The Western Placer Consolidated Transportation Service Agency (WPCTSA), was formed late in 2008 by the Placer County Transportation Planning Agency (PCTPA) during 2008 to address specialized transportation needs and unmet transit needs within Placer County and build upon recommendations of the 2007 *South Placer County Regional Dial-a-Ride Study*.

Agency Profile and Organization

Mission: WPCTSA's early activities were targeted to improve the mobility of individuals who, for a number of reasons, were unable to use the fixed-route transit services provided within and between Placer County's cities and towns and to provide for medical services within Placer County and to selected medical destinations in Sacramento County. An important focus in early discussions was on trips that could not be provided by the existing public transit, fixed-route network and supporting new trips to address unmet transit needs not met by existing transit programs.

WPCTSA's purposes include: 1) to provide for transportation services for seniors and persons with disabilities; 2) to address gaps and unmet transit needs in the existing Placer County public transit network for these individuals; and 3) to encourage and promote partnerships that extend the available Local Transportation Funds (LTF) by leveraging non-profit and human services agency funding to address mobility needs of these target populations.

Organization: WPCTSA is a Joint-Powers authority of the cities and the County, operated under the aegis of the regional planning agency. WPCTSA does not directly provide transportation services but instead, undertakes the provision of social service transportation almost entirely through partnership agreements, through Memoranda of Understanding [MOU] with existing public transit systems, or through agreements with eligible non-profit organizations in relation to the retired vehicle program. Through these agreements, WPCTSA and partners construct programs that are targeted and focused to specific needs. These include:

Partnership Agreements With

- Seniors First for the Health Express Service
- Seniors First for the Transportation Voucher Pilot Program
- Seniors First for the Volunteer Door-to-Door Transportation Pilot Program

Memoranda of Understanding With

- the County of Placer for the enhanced Taylor Road Shuttle
- the City of Roseville for the Transit Ambassador Program
- the City of Roseville for the Centralized Call Center
- individual, eligible non-profit organizations for retired vehicles



Activities and Programs

Current WPCTSA activities are meeting a range of trip purposes and transportation-related needs:

- non-emergency medical trips
- inter-county health care trips
- door-to-door assistance needs
- transportation information
- travel training in use of public transit
- non-profit agency vehicle replacement

WPCTSA 2010/11 programs include:

- Health Express Service is a non-emergency medical transportation service provided by Seniors First, a local non-profit.
- Transportation Voucher Pilot Program provides vouchers for last resort non-emergency medical transportation needs of older adults and persons with disabilities who would otherwise have no means of transportation, and is managed by Seniors First.
- Volunteer Door-to-Door Transportation Pilot Program for individuals who are unable to use traditional public transit, provided by Seniors First.
- Retired Dial-a-Ride Vehicle Program: Western Placer CTSA will purchase retired (surplus) dial-a-ride vehicles from Placer transit operators and sell these vehicles to local non-profit social service agencies for a nominal amount for use to transport older adults and/or disabled clients.
- WPCTSA also funds the [Placer County Transit Taylor Road Shuttle](#) Service Enhancement Pilot Program; the Transit Ambassador Program, the South Placer Transportation Call Center (with Roseville Transit as the designated operator).

WPCTSA is in the process of building a volunteer driver program for operation in FY 2012/13, patterned after Riverside County's nationally known Transportation Reimbursement and Information Project (TRIP) model. This provides modest mileage reimbursement to the individual requiring the trip who can locate his or her own volunteer driver. The TRIP model addresses the national problem of a declining pool of volunteers who will transport multiple individuals but who may consider transporting their neighbor or friend when gas costs can be covered. It also makes it easier for the individual requiring the trip to ask that friend or neighbor for assistance.

Budget

WPCTSA total agency budget for FY11/12 is \$894,095, which leverages the following sources:

- Federal – 5310, 5316 JARC, 5317 New Freedom
- State – TDA Article 4.5
- Local Agency Match - Seniors First contributions made by: Sutter Auburn Faith Hospital, Sutter Roseville, Medical Center and Kaiser Permanente
- In-kind contributions by volunteer drivers



For More Information

- Placer County Transportation Planning Agency: www.pctpa.net

3. *Start-Up/New CTSA:*

VTrans (Valley Transportation Services), San Bernardino County, CA

Valley Transportation Services (VTrans) is a new non-profit created by and designated in October 2010 as the CTSA by SANBAG the Regional Transportation Planning Agency of San Bernardino County.

Agency Profile and Organization

Mission: VTrans' mission is to improve mobility for older adults, persons with disabilities and persons of low income. Its current geographic scope is limited to the San Bernardino Valley area due to the principal funding source; however, as the agency grows and utilizes diverse funding sources, it may choose to expand its geographic reach.

Organization: VTrans is a stand-alone, single purpose non-profit 501(c)(3) corporation. VTrans was created in response to a long-standing need. Preparation for a CTSA in San Bernardino County was supported by the 2007 Public Transit-Human Services Transportation Coordination Plan recommendations and the reauthorization of the Local Sales Tax Measure I, which made a percentage of revenues collected in the valley available for the creation and operation of a CTSA.

VTrans will operate certain programs, while others will be provided through partner agencies. The determination as to which approach will be applied depends upon the nature of the project and the match of the skills of the agency with the project. The following sections demonstrated the projects operated by VTrans and its partners.

Activities and Programs

Programs operated by Vtrans:

- **Mobility Training:** VTrans was awarded a FTA JARC and New Freedom grant for its Mobility Training project, a travel training program for special populations.

Programs operated by partners:

- **Work transportation for individuals with developmental disabilities:** VTrans is providing match for a vocational and training center for individuals with disabilities, Pomona Valley Workshop (PVW). PVW was awarded a JARC and New Freedom grant to develop its own transportation program, PVW in Motion, which currently provides transportation to and from work for adults with disabilities. This service is focusing on being on time and reducing its pick-up window so consumers can get home quicker. An important goal of this program is to shift clients off Omnitrans ADA complementary paratransit service and onto a more cost-effective alternative. As of May 2012, 1,030



monthly trips, taken by 45 individuals, were moved off of paratransit to PVW's service for work trips.

- **Volunteer Mileage Reimbursement Program**, operated by Community Senior Services, a non-profit in Claremont, CA: VTrans provides matching funds for this volunteer driver program for older adults. This program allows participants to reimburse their volunteer drivers for cross county trips, a long-standing need in the region. The multiple partners, VTrans, SANBAG, PVRTA were recently awarded the CalACT 2011 Outstanding Coordination Effort Award, which recognizes CalACT members that have made positive contributions to transportation.
- **Transportation for severely disabled older adults**, operated by Loma Linda Adult Day Health Care Systems: VTrans provides matching funds for this operating project to transport severely disabled clients suffering from severe forms of dementia to and from the health care facility to access treatment and attend daily programs.
- **Non-emergency medical transportation (NEMT) and work and work-related trips for AIDS and HIV positive individuals**, operated by Central City Lutheran Mission. This project seeks to provide transportation to individuals who are willing and able to integrate into society. VTrans provided matching funds for this JARC and New Freedom project.
- **Improving transportation information for veterans**: Inland Empire Veterans Transportation Initiative One-Call / One-Click Project: VTS is a funding partner contributing to this two county initiative to improve access to transportation information for veterans and their families, active military, and the general community. This project is a successful applicant of FTA's 2011 Veterans Transportation and Community Living Initiative (VTCLI) grant program.

Budget

Funding for VTrans comes primarily through the local sales tax measure, Measure I. As the CTSA VTrans is eligible to receive 2% of the Measure I Senior/Disabled funds collected in the Valley portion of San Bernardino. VTrans receives approximately \$1.7 million per year through this funding agreement with SANBAG.

VTrans also received FTA funding through both the JARC and New Freedom 2011 grant cycles, using Measure I money as match and leverage.

For More Information

- Valley Transportation Services (VTrans): www.vtrans.us.com